

Grantee: Tucson, AZ

Grant: B-08-MN-04-0507

January 1, 2014 thru March 31, 2014 Performance Report



Grant Number:

B-08-MN-04-0507

Obligation Date:**Award Date:****Grantee Name:**

Tucson, AZ

Contract End Date:

03/25/2013

Review by HUD:

Reviewed and Approved

LOCCS Authorized Amount:

\$7,286,911.00

Grant Status:

Active

QPR Contact:

Joyce Alcantar

Estimated PI/RL Funds:

\$3,225,468.27

Total Budget:

\$10,512,379.27

Disasters:**Declaration Number**

No Disasters Found

Narratives**Areas of Greatest Need:**

Funds have been targeted in census tracts that have been designated as those with high foreclosure rates.

Distribution and and Uses of Funds:

The City of Tucson will spend 27.7% of the grant fund meeting the 25% set aside requirement, assisting families earning less than 50% of area median income in the designated target areas.

\$720,000 of the administration funds have been fully obligated.

The balance of the grant has been to purchase foreclosed homes to be sold under a Land Trust model to individuals/families who earn between 50 and 65% of area median income.

Definitions and Descriptions:**Low Income Targeting:**

The City of Tucson will purchase homes to be used as permanent rentals to families earning less than 50% of area median income.

Acquisition and Relocation:**Public Comment:****Overall****This Report Period****To Date****Total Projected Budget from All Sources**

N/A

\$10,512,379.27

Total Budget

\$0.00

\$10,512,379.27

Total Obligated

\$0.00

\$10,162,379.27

Total Funds Drawdown

\$143,029.20

\$9,622,483.12

Program Funds Drawdown

\$0.00

\$7,015,392.70



Program Income Drawdown	\$143,029.20	\$2,607,090.42
Program Income Received	\$49,586.51	\$2,925,054.78
Total Funds Expended	\$129,283.05	\$9,631,575.98
Match Contributed	\$0.00	\$0.00

Progress Toward Required Numeric Targets

Requirement	Required	To Date
Overall Benefit Percentage (Projected)		0.00%
Overall Benefit Percentage (Actual)		0.00%
Minimum Non-Federal Match	\$0.00	\$0.00
Limit on Public Services	\$1,093,036.65	\$0.00
Limit on Admin/Planning	\$728,691.10	\$761,055.12
Limit on State Admin	\$0.00	\$761,055.12

Progress Toward Activity Type Targets

Progress Toward National Objective Targets

National Objective	Target	Actual
NSP Only - LH - 25% Set-Aside	\$1,821,727.75	\$2,600,594.82

Overall Progress Narrative:

NSP1 - The following is progress thru March 31, 2014:

Original NSP1 grant funds have been expended, leaving Program Income to be utilized for additional home purchases and rehabilitation work.

Resale progresses as the City of Tucson continues to purchase homes within the NSP1 boundaries, then conveys to the Pima County Community Land Trust (PCCLT) for the rehabilitation and sale to qualified buyers.

No additional homes were purchased by the City of Tucson this quarter.

No homes were sold by the Pima County Community Land Trust (PCCLT) this quarter.

The following homes are in rehabilitation status with PCCLT:

915 W. Franklin Street, Tucson, AZ 85745

>7423 E. 24th Street, Tucson, AZ 85710

>1513 W. Greenlee Street, Tucson, AZ 85705

>9141 E. 39th Street, Tucson, AZ 85746

The following home has had rehabilitation work completed and is under contract (should close in April):

5971 S. Oaklands, Tucson, AZ 85746

>The 25% Set-aside for individuals/families at or below 50% AMI has been exceeded with the purchase of two duplexes last quarter. Program Income was used for the duplex purchases and will be used for the rehabilitation costs. Both duplexes are currently in rehabilitation status, and overseen by City of Tucson staff. Upon completion, they will be assigned to the City of Tucson's EI Portal rental program, and will be rented to tenants at or below 50% AMI.

Addresses are as follows:

3922 E. Mabel Street, Tucson, AZ 85712 (duplex)

>3926 E. Mabel Street, Tucson, AZ 85712 (duplex)

EI Portal rented one NSP1 home this quarter; beneficiary data is reported on in this report.

Project Summary

Project #, Project Title	This Report Period	To Date	
	Program Funds Drawdown	Project Funds Budgeted	Program Funds Drawdown
0001, Acquisition General	\$0.00	\$9,461,141.34	\$6,532,876.29
0002, NSP Rehabilitation Rental	\$0.00	\$0.00	\$0.00
0004, NSP Rehabilitation Resale	\$0.00	\$0.00	\$0.00
0005, NSP Disposition	\$0.00	\$0.00	\$0.00
0006, NSP Administration	\$0.00	\$1,051,237.93	\$482,516.41



Activities

Project # / Title: 0001 / Acquisition General

Grantee Activity Number: 9535
Activity Title: Acq/Rehab

Activity Category:

Disposition

Project Number:

0001

Projected Start Date:

03/23/2009

Benefit Type:

Direct (HouseHold)

National Objective:

NSP Only - LH - 25% Set-Aside

Activity Status:

Under Way

Project Title:

Acquisition General

Projected End Date:

04/15/2010

Completed Activity Actual End Date:

Responsible Organization:

City of Tucson - EI Portal Rental Program, managed by The

Overall	Jan 1 thru Mar 31, 2014	To Date
Total Projected Budget from All Sources	N/A	\$2,765,594.82
Total Budget	\$0.00	\$2,765,594.82
Total Obligated	\$0.00	\$2,600,594.82
Total Funds Drawdown	\$2,442.00	\$2,582,139.41
Program Funds Drawdown	\$0.00	\$2,040,121.70
Program Income Drawdown	\$2,442.00	\$542,017.71
Program Income Received	\$49,586.51	\$187,499.34
Total Funds Expended	\$0.00	\$2,582,139.41
City of Tucson - EI Portal Rental Program, managed by The	\$0.00	\$0.00
City of Tucson1	\$0.00	\$2,582,139.41
Match Contributed	\$0.00	\$0.00

Activity Description:

Acquisition and rehabilitation of 17 foreclosed properties under the NSP for use as permanent rentals for client households that earn under 50% AMI.

These properties will be managed by the City of Tucson EI Portal program. While still owned by the City of Tucson, an outside agency manages the homes. All new leases of these 17 homes will be to households below 50% AMI.

Location Description:

Tucson, Arizona

Activity Progress Narrative:

There were no expenditures for this quarter, except for \$2,442 that was drawn for last quarter's expenditures that had not previously been drawn down.

In addition, there were two transfers for activity 9535; from 9123 and 9537 that were completed to correct for year QPR. A transfer of \$28.32 from 9123 to 9535 on July's FY12 voucher #173507. A transfer of \$40.17 from 9537 to 9123 on February's FY10 voucher #122609. These errors were discovered while completing an overall reconciliation of the NSP1 grant using the City of Tucson Inception to Date report as of March 31, 2014.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Properties	1	25/17

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	1	22/17
# of Multifamily Units	0	0/0
# of Singlefamily Units	1	22/17

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Permanent Jobs Created	0	0	0	0/0	0/0	0/0	0

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	1	0	1	22/17	0/0	22/17	100.00
# Renter Households	1	0	1	22/17	0/0	22/17	100.00

Activity Locations

Address	City	County	State	Zip	Status / Accept
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Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources	Amount
No Other Funding Sources Found	
Total Other Funding Sources	



Grantee Activity Number:	9537
Activity Title:	Acq/Rehab

Activity Category:

Disposition

Project Number:

0001

Projected Start Date:

03/23/2009

Benefit Type:

Direct (HouseHold)

National Objective:

NSP Only - LMMI

Activity Status:

Under Way

Project Title:

Acquisition General

Projected End Date:

04/15/2010

Completed Activity Actual End Date:**Responsible Organization:**

Pima County Community Land Trust (PCCLT)

Overall**Total Projected Budget from All Sources****Jan 1 thru Mar 31, 2014**

N/A

To Date

\$6,695,546.52

Total Budget

\$0.00

\$6,695,546.52

Total Obligated

\$0.00

\$6,545,546.52

Total Funds Drawdown

\$109,195.39

\$6,279,288.59

Program Funds Drawdown

\$0.00

\$4,492,754.59

Program Income Drawdown

\$109,195.39

\$1,786,534.00

Program Income Received

\$0.00

\$2,663,452.87

Total Funds Expended

\$107,281.76

\$6,279,288.59

Pima County Community Land Trust (PCCLT)

\$107,281.76

\$6,279,288.59

Match Contributed

\$0.00

\$0.00

Activity Description:

Acquisition, rehabilitation and disposition of 37 foreclosed homes for resale to client households earning up to 80% AMI through the Pima County Community Land Trust. The Land Trust will have a land lease on these homes for 99 years, automatically renewable for an additional 99 years, that will maintain long-term affordability. The owners may not convey the home without Pima County Community Land Trust involvement and may only receive 25% of equity, if any, in addition to full return of their investment, if proceeds from a future sale allow.

Location Description:

Tucson Arizona

Activity Progress Narrative:

Expenditures for this quarter was \$107,348.01, but reduced by \$66.25 due to an overstated expenditure in a prior year QPR. This was discovered while completing an overall NSP1 reconciliation using the City of Tucson's Inception to Date report as of March 31, 2014. The \$1,913.63 difference between draw and expenditure is because the \$1,913.63 was last quarter's expenditures, which were not drawn down.

In addition, a transfer between activity 9537 and 9535 was completed. The transfer amount was \$40.17, and transferred from 9537 to 9535 on February FY10, Voucher #122609.

Accomplishments Performance Measures

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Properties	0	38/37

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Housing Units	0	34/37
# of Singlefamily Units	0	34/37

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Permanent Jobs Created	0	0	0	0/0	0/0	0/0	0

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	0	0	0	27/37	7/0	34/37	100.00
# Owner Households	0	0	0	27/37	7/0	34/37	100.00

Activity Locations

No Activity Locations found.

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources	Amount
No Other Funding Sources Found	
Total Other Funding Sources	

Project # / Title: 0005 / NSP Disposition

Grantee Activity Number:	9539
Activity Title:	NSP Disposition

Activity Category:

Disposition

Project Number:

0005

Projected Start Date:

03/23/2009

Benefit Type:

Direct (HouseHold)

Activity Status:

Planned

Project Title:

NSP Disposition

Projected End Date:

01/15/2012

Completed Activity Actual End Date:



National Objective:

NSP Only - LMMI

Responsible Organization:

City of Tucson

Overall	Jan 1 thru Mar 31, 2014	To Date
Total Projected Budget from All Sources	N/A	\$0.00
Total Budget	\$0.00	\$0.00
Total Obligated	\$0.00	\$0.00
Total Funds Drawdown	\$0.00	\$0.00
Program Funds Drawdown	\$0.00	\$0.00
Program Income Drawdown	\$0.00	\$0.00
Program Income Received	\$0.00	\$0.00
Total Funds Expended	\$0.00	\$0.00
City of Tucson1	\$0.00	\$0.00
Match Contributed	\$0.00	\$0.00

Activity Description:

Resale of 26 foreclosed homes to client huseholds earning under 65% AMI using a Community land Trust Model.

Location Description:

Tucson, Arizona

Activity Progress Narrative:**Accomplishments Performance Measures**

	This Report Period	Cumulative Actual Total / Expected
	Total	Total
# of Properties	0	8/0

Beneficiaries Performance Measures

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Permanent Jobs Created	0	0	0	0/0	0/0	0/0	0

	This Report Period			Cumulative Actual Total / Expected			
	Low	Mod	Total	Low	Mod	Total	Low/Mod%
# of Households	0	0	0	8/0	0/0	8/0	100.00



Activity Locations

No Activity Locations found.

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources

Amount

No Other Funding Sources Found

Total Other Funding Sources

Project # / Title: 0006 / NSP Administration

Grantee Activity Number: 9123

Activity Title: NSP Administration

Activity Category:

Administration

Project Number:

0006

Projected Start Date:

03/23/2009

Benefit Type:

()

National Objective:

N/A

Activity Status:

Under Way

Project Title:

NSP Administration

Projected End Date:

04/15/2010

Completed Activity Actual End Date:

Responsible Organization:

City of Tucson1

Overall

Total Projected Budget from All Sources

Jan 1 thru Mar 31, 2014

To Date

N/A

\$1,051,237.93

Total Budget

\$0.00

\$1,051,237.93

Total Obligated

\$0.00

\$1,016,237.93

Total Funds Drawdown

\$31,391.81

\$761,055.12

Program Funds Drawdown

\$0.00

\$482,516.41

Program Income Drawdown

\$31,391.81

\$278,538.71

Program Income Received

\$0.00

\$74,102.57

Total Funds Expended

\$22,001.29

\$770,147.98

City of Tucson1

\$22,001.29

\$770,147.98

Match Contributed

\$0.00

\$0.00

Activity Description:



Location Description:

Tucson, Arizona.

Activity Progress Narrative:

Administration Expenditures for this quarter was \$19,201.30, but \$2,799.99 were added for expenditures due to a previous year's incorrect QPR. This was discovered while completing an overall NSP1 reconciliation using the City of Tucson's Inception to Date report as of March 31, 2014. The \$12,190.51 (\$31,391.81 - \$19,201.30) difference between draw and expenditure is for last quarter's expenditures that were not drawn down at that time. In addition, a transfer between activity 9123 to 9535 for \$28.32 was completed under Voucher #173507 from July of FY12. The \$28.32 was incorrectly drawn from 9123 and should have been drawn from 9535.

Accomplishments Performance Measures

No Accomplishments Performance Measures found.

Beneficiaries Performance Measures

No Beneficiaries Performance Measures found.

Activity Locations

No Activity Locations found.

Other Funding Sources Budgeted - Detail

No Other Match Funding Sources Found

Other Funding Sources

Amount

No Other Funding Sources Found

Total Other Funding Sources
